

Complexity

The barrier to the 'institutionalization' of DC investment options, endowments & pension funds.

OBJECTIVE

The principal objective is to deliver better retirement outcomes. Institutionalization is an essential strategy in pursuit of that objective.

What does this mean exactly?

It means ensuring that the design and implementation of DC investment options are raised to the level of the best practices of institutional investors such as endowments and defined benefit pension plans.

BARRIERS

- Advanced investment strategies
- Advanced portfolio implementation
- Scale/access to low cost/high quality products and operational services
- Increasing use of alternative assets
- Rigorous, ongoing evaluation and control
- Rigorous management of cost and performance

DRIVERS

Intense competition motivated by:

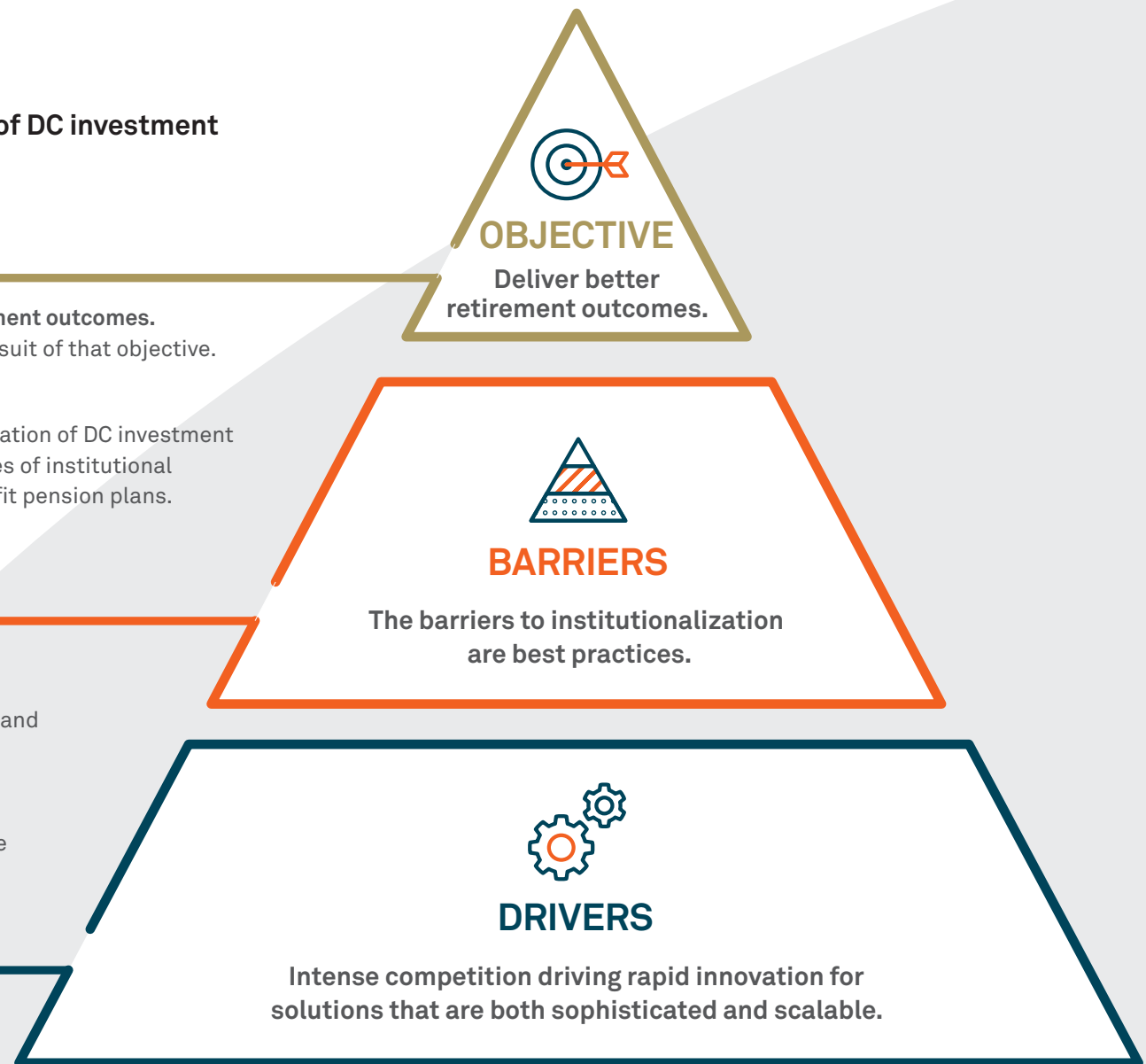
Altruism:

Better retirement outcomes

Commerce:

Success in a high profile, high value and hyper competitive industry

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